

New Customer/New Case - Borrower Calls

| <b>Applet Field Name</b>          | <b>Logical Field Name</b> | <b>Smartsript Question Name</b> | <b>Question Text</b>   | <b>Pick Applet</b>                   | <b>Notes</b> | <b>Required Field?</b> |
|-----------------------------------|---------------------------|---------------------------------|--|--------------------------------------|--------------|------------------------|
| N/A                               | N/A                       | Master Greeting                 | * Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?  | N/A                                  |              | Y                      |
| N/A                               | N/A                       | SR Master Link                  | [NOTE: Press Enter.]   | N/A                                  |              | N                      |
| Original Issue Summary            | Original Issue Summary    | Case Summary                    | * I'm glad you called. How may I help you today?<br>[NOTE: Type caller's problem.]   | N/A                                  |              | Y                      |
| Original Issue Category           | Version                   | Case Main Category              | * [NOTE: Select Issue Category.]   | SR Area Pick Applet                  |              | Y                      |
| Original Issue Sub-Category       | Severity                  | Case Sub Category               | * [NOTE: Select Issue Sub Category.]   | SR Sub-Area Hierarchical Pick Applet |              | Y                      |
| Customer Expectation Summary      | Abstract                  | Case Exp Summary                | [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.] | N/A                                  |              | N                      |
| Customer Expectation Category     | Customer Category         | Case Exp Category               | [NOTE: Select Expectation Category.]   | OCTS Contact Type Pick Applet        |              | N                      |
| Customer Expectation Sub-Category | Resolution Code           | Case Exp Sub Category           | [NOTE: Select Expectation Sub Category.]   | SR Sub-Area Hierarchical Pick Applet |              | N                      |
| Case Referred By                  | Source                    | Case Referred by                | How did you hear about our office?   | SR Source Pick Applet                |              | Y                      |
| N/A                               | N/A                       | KC Pilot - Contact Intro        | OK, I think I have an understanding of your problem. I need to gather some information about yourself if that's alright. [Hit Enter to continue]   | N/A                                  |              | N                      |
| Case Account                      | Account                   | Cntc SSN                        | * [NOTE: The following questions are about the borrower. If the caller is a third party, use his/her.] Now I need to gather some profile information about you. May I have your social security                      | N/A                                  |              | Y                      |
| Case First Name                   | First Name                | Cntc First Name                 | * May I have your first name?  | N/A                                  |              | Y                      |
| Case Last Name                    | Last Name                 | Cntc Last Name                  | * May I have your last name?   | N/A                                  |              | Y                      |
| Contact Suffix                    | Suffix                    | Cntc Name Suffix                | [NOTE: Select Jr., Sr., III, etc.]   | OCTS Contact Type Pick Applet        |              | N                      |
| Contact M.I.                      | Middle Name               | Cntc Middle Name                | What is your middle name or initial?   | N/A                                  |              | N                      |
| Contact Prefix                    | M/M                       | Cntc Name Prefix                | [NOTE: Select name prefix.]  | OCTS Contact Type Pick Applet        |              | N                      |
| Contact Preferred                 | Alias                     | Cntc Name Preferred             | Do you have a preferred name or nickname?  | N/A                                  |              | N                      |
| Account DOB                       | Birthdate                 | Acct Birthdate                  | May I have your birthdate? [NOTE: mm/dd/yyyy]  | N/A                                  |              | N                      |
| Address Street                    | Address                   | Cntc Street                     | What is your street address?   | N/A                                  |              | N                      |
| Address City                      | Contact City              | Cntc City                       | City?  | N/A                                  |              | N                      |
| Address State                     | Contact State             | Cntc State                      | State?   | OCTS Contact Type Pick Applet        |              | N                      |
| Address Zip                       | Zip Code                  | Cntc Zip                        | Zipcode?   | N/A                                  |              | N                      |
| Address Country                   | Contact Country           | Cntc Country                    | [NOTE: Select country.]  | OCTS Contact Type Pick Applet        |              | N                      |
| Availability Method               | Assistant                 | Cntc Method                     | * What is the best way for our office to contact you?  | OCTS Contact Type Pick Applet        |              | Y                      |
| Phone Numbers Home                | Home Phone #              | Cntc Home Phone                 | Home Phone?  | N/A                                  |              | N                      |

New Customer/New Case - Borrower Calls

| <u>Applet Field Name</u>   | <u>Logical Field Name</u> | <u>Smartscript Question Name</u> | <u>Question Text</u>   | <u>Pick Applet</u>              | <u>Notes</u>  | <u>Required Field?</u> |
|----------------------------|---------------------------|----------------------------------|--|---------------------------------|---|------------------------|
| Phone Numbers Work         | Work Phone #              | Cntc Work Phone                  | Work Phone?  | N/A                             |   | N                      |
| Phone Numbers Fax          | Fax Phone #               | Cntc Fax                         | Fax Number?  | N/A                             |   | N                      |
| Phone Numbers Mobile       | Cellular Phone #          | Cntc Mobile Phone                | Mobile Phone?  | N/A                             |   | N                      |
| Phone Numbers Country Code | Country Code              | Cntc Country Code                | [NOTE: Enter country code.]  | N/A                             |   | N                      |
| Email 1st                  | Email Address             | Cntc Email1                      | Email address?   | N/A                             |   | N                      |
| Email 2nd                  | Secondary Email           | Cntc Email2                      | Secondary email address?   | N/A                             |   | N                      |
| Availability Hours         | Hrs Avail                 | Cntc Availability                | What is the best time of day to contact you?   | N/A                             |   | N                      |
| Availability TM ZN         | Time Zone                 | Cntc Time Zone                   | [NOTE: Select time zone. Confirm with caller.]   | OCTS Contact Type Pick Applet   |   | N                      |
| N/A                        | N/A                       | Loan Lead in                     | OK, I'd like to get a little more information on your loan please.   | N/A                             |   | N                      |
| Loan Type                  | Product                   | Loan Type                        | * What type of loan do you have?   | SR Internal Product Pick Applet |   | Y                      |
| Svc Agency                 | Servicing Agency          | Loan Servicer                    | * Who holds your loan?   | OCTS Contact Type Pick Applet   |   | Y                      |
| Loan Status                | Loan Status               | Loan Status                      | * What is the current status of your loan?   | OCTS Contact Type Pick Applet   |   | Y                      |
| N/A                        | N/A                       | SR Resolution of Problem         | Hold for a moment while I search for further information on [Area] in the database.  | N/A                             |   | N                      |
| N/A                        | N/A                       | SR Decision Issue                | [ExistText][Explanation].  | N/A                             |   | N                      |
| N/A                        | N/A                       | SR Decision Issue How to Discuss | [ExistText] [Discuss]  | N/A                             |   | N                      |
| N/A                        | N/A                       | Goodbye Q0                       | [NOTE: Are you speaking with the borrower?]  | N/A                             |   | Y                      |
| N/A                        | N/A                       | Goodbye Q1                       | [NOTE: Can you resolve the issue now?]   | N/A                             | If "NO", goto Goodbye Q3.<br>If "YES", goto Goodbye | Y                      |
| N/A                        | N/A                       | Goodbye Q3                       | Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling.<br>[NOTE: Press Enter twice to end the script and provide caller with case | N/A                             |   | N                      |
| N/A                        | N/A                       | Goodbye Q2                       | [NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]  | N/A                             |   | N                      |

New Customer/New Case - 3rd Party Calls

| <b>Applet Field Name</b>      | <b>Logical Field Name</b> | <b>Smartsript Question Name</b> | <b>Question Text</b>   | <b>Pick Applet</b>                   | <b>Notes</b> | <b>Required Field?</b> |
|-------------------------------|---------------------------|---------------------------------|--|--------------------------------------|--------------|------------------------|
| N/A                           | N/A                       | Master Greeting                 | * Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?  | N/A                                  |              | Y                      |
| N/A                           | N/A                       | SR Master Link                  | [NOTE: Press Enter.]   | N/A                                  |              | N                      |
| Original Issue Summary        | Original Issue Summary    | Case Summary                    | * I'm glad you called. How may I help you today?<br>[NOTE: Type caller's problem.]   | N/A                                  |              | Y                      |
| Original Issue Category       | Version                   | Case Main Category              | * [NOTE: Select Issue Category.]   | SR Area Pick Applet                  |              | Y                      |
| Original Issue Sub-Category   | Severity                  | Case Sub Category               | * [NOTE: Select Issue Sub Category.]   | SR Sub-Area Hierarchical Pick Applet |              | Y                      |
| Customer Expectation Summary  | Abstract                  | Case Exp Summary                | [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.] | N/A                                  |              | N                      |
| Customer Expectation Category | Customer Category         | Case Exp Category               | [NOTE: Select Expectation Category.]   | OCTS Contact Type Pick Applet        |              | N                      |
| Customer Expectation Sub-     | Resolution Code           | Case Exp Sub Category           | [NOTE: Select Expectation Sub  | SR Sub-Area Hierarchical Pick Applet |              | N                      |
| Case Referred By              | Source                    | Case Referred by                | How did you hear about our office?   | SR Source Pick Applet                |              | Y                      |
| N/A                           | N/A                       | KC Pilot - Contact Intro        | OK, I think I have an understanding of your problem. I need to gather some information about yourself if that's alright. [Hit Enter to continue]   | N/A                                  |              | N                      |
| Case Account                  | Account                   | Cntc SSN                        | * [NOTE: The following questions are about the borrower. If the caller is a third party, use his/her.] Now I need to gather some profile information about you. May I have your social security                      | N/A                                  |              | Y                      |
| Case First Name               | First Name                | Cntc First Name                 | * May I have your first name?  | N/A                                  |              | Y                      |
| Case Last Name                | Last Name                 | Cntc Last Name                  | * May I have your last name?   | N/A                                  |              | Y                      |
| Contact Suffix                | Suffix                    | Cntc Name Suffix                | [NOTE: Select Jr., Sr., III, etc.]   | OCTS Contact Type Pick Applet        |              | N                      |
| Contact M.I.                  | Middle Name               | Cntc Middle Name                | What is your middle name or initial?   | N/A                                  |              | N                      |
| Contact Prefix                | M/M                       | Cntc Name Prefix                | [NOTE: Select name prefix.]  | OCTS Contact Type Pick Applet        |              | N                      |
| Contact Preferred             | Alias                     | Cntc Name Preferred             | Do you have a preferred name or nickname?  | N/A                                  |              | N                      |
| Account DOB                   | Birthdate                 | Acct Birthdate                  | May I have your birthdate? [NOTE: mm/dd/yyyy]  | N/A                                  |              | N                      |
| Address Street                | Address                   | Cntc Street                     | What is your street address?   | N/A                                  |              | N                      |
| Address City                  | Contact City              | Cntc City                       | City?  | N/A                                  |              | N                      |
| Address State                 | Contact State             | Cntc State                      | State?   | OCTS Contact Type Pick Applet        |              | N                      |
| Address Zip                   | Zip Code                  | Cntc Zip                        | Zipcode?   | N/A                                  |              | N                      |
| Address Country               | Contact Country           | Cntc Country                    | [NOTE: Select country.]  | OCTS Contact Type Pick Applet        |              | N                      |
| Availability Method           | Assistant                 | Cntc Method                     | * What is the best way for our office to contact you?  | OCTS Contact Type Pick Applet        |              | Y                      |
| Phone Numbers Home            | Home Phone #              | Cntc Home Phone                 | Home Phone?  | N/A                                  |              | N                      |
| Phone Numbers Work            | Work Phone #              | Cntc Work Phone                 | Work Phone?  | N/A                                  |              | N                      |
| Phone Numbers Fax             | Fax Phone #               | Cntc Fax                        | Fax Number?  | N/A                                  |              | N                      |
| Phone Numbers Mobile          | Cellular Phone #          | Cntc Mobile Phone               | Mobile Phone?  | N/A                                  |              | N                      |
| Phone Numbers Country Code    | Country Code              | Cntc Country Code               | [NOTE: Enter country code.]  | N/A                                  |              | N                      |

New Customer/New Case - 3rd Party Calls

| <b><u>Applet Field Name</u></b> | <b><u>Logical Field Name</u></b> | <b><u>Smartsript Question Name</u></b> | <b><u>Question Text</u></b>  | <b><u>Pick Applet</u></b>       | <b><u>Notes</u></b>                                     | <b><u>Required Field?</u></b> |
|---------------------------------|----------------------------------|--|--|---------------------------------|---|-------------------------------|
| Email 1st                       | Email Address                    | Cntc Email1                            | Email address?   | N/A                             |   | N                             |
| Email 2nd                       | Secondary Email                  | Cntc Email2                            | Secondary email address?   | N/A                             |   | N                             |
| Availability Hours              | Hrs Avail                        | Cntc Availability                      | What is the best time of day to contact you?   | N/A                             |   | N                             |
| Availability TM ZN              | Time Zone                        | Cntc Time Zone                         | [NOTE: Select time zone. Confirm with caller.]   | OCTS Contact Type Pick Applet   |   | N                             |
| N/A                             | N/A                              | Loan Lead in                           | OK, I'd like to get a little more information on your loan please.   | N/A                             |   | N                             |
| Loan Type                       | Product                          | Loan Type                              | * What type of loan do you have?   | SR Internal Product Pick Applet |   | Y                             |
| Svc Agency                      | Servicing Agency                 | Loan Servicer                          | * Who holds your loan?   | OCTS Contact Type Pick Applet   |   | Y                             |
| Loan Status                     | Loan Status                      | Loan Status                            | * What is the current status of your loan?   | OCTS Contact Type Pick Applet   |   | Y                             |
| N/A                             | N/A                              | SR Resolution of Problem               | Hold for a moment while I search for further information on [Area] in the database.  | N/A                             |   | N                             |
| N/A                             | N/A                              | SR Decision Issue                      | [ExistText][Explanation].  | N/A                             |   | N                             |
| N/A                             | N/A                              | SR Decision Issue How to Discuss       | [ExistText] [Discuss]  | N/A                             |   | N                             |
| N/A                             | N/A                              | Goodbye Q0                             | [NOTE: Are you speaking with the borrower?]  | N/A                             |   | Y                             |
| N/A                             | N/A                              | Goodbye Q5                             | [NOTE: Press Enter twice.]   | N/A                             |   | N                             |
| N/A                             | N/A                              | SR TEST                                | [NOTE: Press Enter to continue.]   | N/A                             |   | N                             |
| Case Last Name                  | N/A                              | SR Add a Contact 1                     | NOTE: Press F2. Using the borrower's SSN, [SSN], add the third party contact information.  | N/A                             |   | Y                             |
| N/A                             | N/A                              | Goodbye Q1                             | [NOTE: Can you resolve the issue now?]   | N/A                             | If "NO", goto Goodbye Q3.<br>If "YES", goto Goodbye Q2. | Y                             |
| N/A                             | N/A                              | Goodbye Q3                             | Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.] | N/A                             |   | N                             |
| N/A                             | N/A                              | Goodbye Q2                             | [NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]  | N/A                             |   | N                             |

## Existing Customer/Existing Case - Status or Demographic Update

| <b><u>Applet Field Name</u></b> | <b><u>Logical Field Name</u></b> | <b><u>Smartsript Question Name</u></b> | <b><u>Question Text</u></b>   | <b><u>Pick Applet</u></b> | <b><u>Notes</u></b> | <b><u>Required Field?</u></b> |
|---------------------------------|----------------------------------|--|---|---------------------------|---------------------|-------------------------------|
| N/A                             | N/A                              | Master Greeting                        | * Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office? | N/A                       |                     | Y                             |
| N/A                             | N/A                              | Master Existing Case?                  | Are you calling about an existing case?   | N/A                       | Answer = YES        | Y                             |
| N/A                             | N/A                              | Master Existing Yes                    | [NOTE: Press Enter twice to end the script. Use the OCTS 2.0 screens to find the case and log an activity.]                                   | N/A                       |                     | N                             |

## Existing Customer/New Case - Borrower Calls

| <u>Applet Field Name</u>    | <u>Logical Field Name</u> | <u>Smartsript Question Name</u>  | <u>Question Text</u>   | <u>Pick Applet</u>                   | <u>Notes</u>   | <u>Required Field?</u> |
|-----------------------------|---------------------------|----------------------------------|--|--------------------------------------|--|------------------------|
| N/A                         | N/A                       | Master Greeting                  | Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?  | N/A                                  |  | Y                      |
| N/A                         | N/A                       | Master Existing Case?            | Are you calling about an existing case?  | N/A                                  | Answer = NO  | Y                      |
| N/A                         | N/A                       | SR Master Link                   | [NOTE: Press Enter.]   | N/A                                  |  | N                      |
| N/A                         | N/A                       | Goodbye Q0                       | [NOTE: Are you speaking with the borrower?]  | N/A                                  | Answer = YES   | Y                      |
| Case Last Name              | Contact Last Name         | SR Last Name                     | [NOTE: Press F2. Search for the account with the borrower's SSN.] May I have your social security number please?   | SR Contact Pick Applet               |  | Y                      |
| N/A                         | N/A                       | SR Verify First Name-Borrower    | NOTE: You have selected [First Name] [Last Name] as the Borrower. If this is correct, press Enter. If this is incorrect, click on the question above and press F2  | N/A                                  |  | Y                      |
| N/A                         | N/A                       | SR Master Link                   | [NOTE: Press Enter.]   | N/A                                  |  | N                      |
| Original Issue Summary      | Original Issue Summary    | SR Profile Info                  | How may I help you today? [NOTE: Type caller's problem.]   | N/A                                  |  | Y                      |
| Original Issue Category     | Version                   | SR Area Of Problem               | [NOTE: Select Issue Category.]   | SR Area Pick Applet                  |  | Y                      |
| Original Issue Sub-Category | Severity                  | SR Error Detail                  | [NOTE: Select Issue Sub Category.]   | SR Sub-Area Hierarchical Pick Applet |  | Y                      |
| N/A                         | N/A                       | Loan Lead in                     | OK, I'd like to get a little more information on your loan please.   | N/A                                  |  | N                      |
| Loan Type                   | Product                   | Loan Type                        | * What type of loan do you have?   | SR Internal Product Pick Applet      |  | Y                      |
| Svc Agency                  | Servicing Agency          | Loan Servicer                    | * Who holds your loan?   | OCTS Contact Type Pick Applet        |  | Y                      |
| Loan Status                 | Loan Status               | Loan Status                      | * What is the current status of your loan?   | OCTS Contact Type Pick Applet        |  | Y                      |
| N/A                         | N/A                       | SR Resolution of Problem         | Hold for a moment while I search for further information on [Area] in the database.  | N/A                                  |  | N                      |
| N/A                         | N/A                       | SR Decision Issue                | [ExistText][Explanation].  | N/A                                  |  | N                      |
| N/A                         | N/A                       | SR Decision Issue How to Discuss | [ExistText] [Discuss]  | N/A                                  |  | N                      |
| N/A                         | N/A                       | Goodbye Q1                       | [NOTE: Can you resolve the issue now?]   | N/A                                  | If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2. | Y                      |
| N/A                         | N/A                       | Goodbye Q3                       | Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.] | N/A                                  |  | N                      |
| N/A                         | N/A                       | Goodbye Q2                       | [NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]  | N/A                                  |  | N                      |

## Existing Customer/New Case - Third Party Calls

| Applet Field Name           | Logical Field Name     | Smartsript Question Name         | Question Text   | Pick Applet                          | Notes   | Required Field? |
|-----------------------------|------------------------|----------------------------------|---|--------------------------------------|---|-----------------|
| N/A                         | N/A                    | Master Greeting                  | * Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?   | N/A                                  |   | Y               |
| N/A                         | N/A                    | Master Existing Case?            | Are you calling about an existing case?   | N/A                                  | Answer = NO   | Y               |
| N/A                         | N/A                    | SR Master Link                   | [NOTE: Press Enter.]  | N/A                                  |   | N               |
| N/A                         | N/A                    | Goodbye Q0                       | [NOTE: Are you speaking with the borrower?]   | N/A                                  | Answer = NO   | Y               |
| Case Last Name              | Contact Last Name      | SR Last Name                     | [NOTE: Press F2. Search for the account with the borrower's SSN. Then, add the third party as a contact for the case] May I please have the borrower's social security number?  | SR Contact Pick Applet               |   | Y               |
| N/A                         | N/A                    | SR Verify First Name-Borrower    | NOTE: You have selected [First Name] [Last Name] as the Third Party Contact. If this is correct, press Enter. If this is incorrect, click on the question above and press F2 to reselect.   | N/A                                  |   | Y               |
| N/A                         | N/A                    | SR Master Link                   | [NOTE: Press Enter.]  | N/A                                  |   | N               |
| Original Issue Summary      | Original Issue Summary | SR Profile Info                  | How may I help you today? [NOTE: Type caller's problem.]  | N/A                                  |   | Y               |
| Original Issue Category     | Version                | SR Area Of Problem               | [NOTE: Select Issue Category.]  | SR Area Pick Applet                  |   | Y               |
| Original Issue Sub-Category | Severity               | SR Error Detail                  | [NOTE: Select Issue Sub Category.]  | SR Sub-Area Hierarchical Pick Applet |   | Y               |
| N/A                         | N/A                    | Loan Lead in                     | OK, I'd like to get a little more information on your loan please.  | N/A                                  |   | Y               |
| Loan Type                   | Product                | Loan Type                        | * What type of loan do you have?  | SR Internal Product Pick Applet      |   | Y               |
| Svc Agency                  | Servicing Agency       | Loan Servicer                    | * Who holds your loan?  | OCTS Contact Type Pick Applet        |   | Y               |
| Loan Status                 | Loan Status            | Loan Status                      | * What is the current status of your loan?  | OCTS Contact Type Pick Applet        |   | N               |
| N/A                         | N/A                    | SR Resolution of Problem         | Hold for a moment while I search for further information on [Area] in the database.   | N/A                                  |   | N               |
| N/A                         | N/A                    | SR Decision Issue                | [ExistText][Explanation].   | N/A                                  |   | N               |
| N/A                         | N/A                    | SR Decision Issue How to Discuss | [ExistText] [Discuss]   | N/A                                  |   | N               |
| N/A                         | N/A                    | Goodbye Q1                       | [NOTE: Can you resolve the issue now?]  | N/A                                  | If "NO", goto Goodbye Q3.<br>If "YES", goto Goodbye | Y               |
| N/A                         | N/A                    | Goodbye Q3                       | Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case | N/A                                  |   | N               |

## Existing Customer/New Case - Third Party Calls

| <u>Applet Field Name</u> | <u>Logical Field Name</u> | <u>Smartsript Question Name</u> | <u>Question Text</u>  | <u>Pick Applet</u> | <u>Notes</u> | <u>Required Field?</u> |
|--------------------------|---------------------------|---------------------------------|---|--------------------|--------------|------------------------|
| N/A                      | N/A                       | Goodbye Q2                      | [NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.] | N/A                |              | N                      |



### **Contact Fields**

13 Last Name  
11 First Name  
12 Middle Initial  
15 Preferred Name  
16 Prefix to Name  
14 Suffix to Name  
18 Street Address  
19 City  
20 State  
21 Zip  
22 Country  
23 Home Phone  
24 Work Phone  
25 Fax  
26 Country Code (for phone #)  
27 Mobile Phone  
28 1st Email  
29 2nd Email  
31 Hours of Availability  
32 Time Zone  
30 Method of Contact  
33 Special Notes/SME  
9 Type (Customer)  
8 Account (SSN)  
10 Relationship/Title

### **Account Fields**

Account (SSN)  
Last Name  
Account Type (Customer)  
17 Birthdate  
Street Address  
City  
State  
Zip  
Country  
Site  
Phone #  
Fax #  
Homepage (email)  
34 Comments

### **Case Fields**

Case #  
Last Name  
First Name  
Account (SSN)  
7 Referred by  
Home Phone  
2 Category  
3 Sub-category  
1 Issue Summary  
Revised Issue Cat.  
Revised Issue Sub Cat.  
Revised Issue Summary  
5 Cust Exp Cat.  
6 Cust Exp Sub Cat.  
4 Cust Exp Summary  
35 Cust Exp Status Notes

| <b><u>BC</u></b> | <b><u>Order</u></b> | <b><u>Applet Field Name</u></b> | <b><u>Logical Field Name</u></b> | <b><u>Smartsript Question Name</u></b> | <b><u>Question Text</u></b>  |
|------------------|---------------------|---------------------------------|----------------------------------|--|------------------------------|
| N/A              |                     | N/A                             |                                  |  |                              |
| K                | 1                   | Issue Summary                   | Original Issue Summary           | Case Summary                           | How can I help you?          |
| K                | 2                   | Category                        | Original Issue                   | Case Main Category                     | Classify Main Issue Cat      |
| K                | 3                   | Sub-category                    | Severity                         | Case Sub Category                      | Classify Sub Issue Category  |
| K                | 4                   | Cust Exp Summary                | Customer Expectation Summary     | Case Exp Summary                       | What do you expect?          |
| K                | 5                   | Cust Exp Cat.                   |                                  | Case Exp Category                      | Classify                     |
| K                | 6                   | Cust Exp Sub Cat.               |                                  | Case Exp Sub Category                  | Classify                     |
| K                | 7                   | Referred by                     | Source                           | Case Referred by                       | Where did you here about us? |
| N/A              | 8                   | N/A                             |                                  |  |                              |
| C                | 9                   | Type (Customer)                 | Contact Type                     | Cntc Type                              | Are you the borrower         |
| C                | 10                  | Relationship/Title              | Job Title                        | Cntc Relation                          | Classify                     |
| C                | 11                  | Account (SSN)                   | Account                          | Cntc SSN                               | What is your SSN?            |
| C                | 12                  | First Name                      | First Name                       | Cntc First Name                        | First Name?                  |
| C                | 13                  | Last Name                       | Last Name                        | Cntc Last Name                         | Last Name?                   |
| C                | 14                  | Suffix to Name                  | Suffix                           | Cntc Name Suffix                       | Jr.? Sr.,etc                 |
| C                | 15                  | Middle Initial                  | Middle Name                      | Cntc Middle Name                       | Middle Initial?              |
| C                | 16                  | Prefix to Name                  | M/M                              | Cntc Name Prefix                       | Classify                     |
| C                | 17                  | Preferred Name                  | Alias                            | Cntc Name Preferred                    | What do you go by?           |
| A                | 18                  | Birthdate                       | Birthdate                        | Acct Birthdate                         | Birthdate?                   |
| C                | 19                  | Street Address                  | Address                          | Cntc Street                            | Street Address?              |
| C                | 20                  | City                            | Contact City                     | Cntc City                              | City?                        |
| C                | 21                  | State                           | Contact State                    | Cntc State                             | State?                       |
| C                | 22                  | Zip                             | Zip Code                         | Cntc Zip                               | Zip?                         |
| C                | 23                  | Country                         | Contact Country                  | Cntc Country                           | Classify                     |
| C                | 24                  | Method of Contact               | Assistant                        | Cntc Method                            | How should we contact you?   |
| C                | 25                  | Home Phone                      | Home Phone #                     | Cntc Home Phone                        | Home Phone?                  |
| C                | 26                  | Work Phone                      | Work Phone #                     | Cntc Work Phone                        | Work Phone?                  |
| C                | 27                  | Mobile Phone                    | Cellular Phone #                 | Cntc Mobile Phone                      | Mobile Phone?                |
| C                | 28                  | Fax                             | Fax Phone #                      | Cntc Fax                               | Fax Number?                  |

| <b><u>BC</u></b> | <b><u>Order</u></b> | <b><u>Applet Field Name</u></b> | <b><u>Logical Field Name</u></b> | <b><u>Smartsript Question Name</u></b> | <b><u>Question Text</u></b> |
|------------------|---------------------|---------------------------------|----------------------------------|--|-----------------------------|
| C                | 29                  | Country Code (for phone #       | Country Code                     | Cntc Country Code                      | Country Code?               |
| C                | 30                  | 1st Email                       | Email Address                    | Cntc Email1                            | Email?                      |
| C                | 31                  | 2nd Email                       | Secondary Address                | Cntc Email2                            | Another email?              |
| C                | 32                  | Hours of Availability           | Hrs Avail                        | Cntc Availability                      | When are you available      |
| C                | 33                  | Time Zone                       | Time Zone                        | Cntc Time Zone                         | Classify                    |
| C                | 34                  | Special Notes/SME               | Comment                          | Cntc Comments                          | Additional Comments?        |
| A                | 35                  | Comments                        | Note                             | Acct Comments                          | Additional Comments?        |
| K                | 36                  | Cust Exp Status Notes           |                                  | Case Comments                          | Additional Comments?        |
| A                |                     | Account (SSN)                   | N/A                              |  |                             |
| A                |                     | Last Name                       | N/A                              |  |                             |
| A                |                     | Account Type (Customer)         | N/A                              |  |                             |
| A                |                     | Street Address                  | N/A                              |  |                             |
| A                |                     | City                            | N/A                              |  |                             |
| A                |                     | State                           | N/A                              |  |                             |
| A                |                     | Zip                             | N/A                              |  |                             |
| A                |                     | Country                         | N/A                              |  |                             |
| A                |                     | Site                            | N/A                              |  |                             |
| A                |                     | Phone #                         | N/A                              |  |                             |
| A                |                     | Fax #                           | N/A                              |  |                             |
| A                |                     | Homepage (email)                | N/A                              |  |                             |
| K                |                     | Case #                          | N/A                              |  |                             |
| K                |                     | Last Name                       | N/A                              |  |                             |
| K                |                     | First Name                      | N/A                              |  |                             |
| K                |                     | Account (SSN)                   | N/A                              |  |                             |
| K                |                     | Home Phone                      | N/A                              |  |                             |
| K                |                     | Revised Issue Cat.              | N/A                              |  |                             |
| K                |                     | Revised Issue Sub Cat.          | N/A                              |  |                             |
| K                |                     | Revised Issue Summary           | N/A                              |  |                             |

| <b>BC</b> | <b>Order</b> | <b><u>Applet Field Name</u></b> | <b><u>Notes</u></b>  | <b><u>Question Text</u></b>                                    | <b><u>Question<br/>or<br/>Prompt</u></b> |  |  |  |
|-----------|--------------|---------------------------------|--|--|--|--|--|--|
| N/A       |              | N/A                             | General Greeting -<br>question occurs<br>outside this script | Good (time of day), this is<br>the Office of the<br>OMBUDSMAN. |  |  |  |  |
| K         | 1            | Issue Summary                   |  | How can I help you?  | Q  |  | <b>K=Cases</b><br><b>C=Contacts</b><br><b>A=Accounts</b><br><br><b><u>Naming Std's</u></b><br><b>Cntc Field Name</b><br><br><b>Case Field Name</b><br><b>Acct Field Name</b> |  |
| K         | 2            | Category                        |  | Classify Main Issue Cat  | P  |  |  |  |
| K         | 3            | Sub-category                    |  | Classify Sub Issue Category                                    | P  |  |  |  |
| K         | 4            | Cust Exp Summary                |  | What do you expect?  | Q  |  |  |  |
| K         | 5            | Cust Exp Cat.                   |  | Classify   | P  |  |  |  |
| K         | 6            | Cust Exp Sub Cat.               |  | Classify   | P  |  |  |  |
| K         | 7            | Referred by                     |  | Where did you here about<br>us?                                | Q  |  |  |  |
| N/A       | 8            | N/A                             |  | OK, I think I understand...                                    | P  |  |  |  |
| C         | 9            | Type (Customer)                 |  | Are you the borrower?  | Q  |  |  |  |
| C         | 10           | Relationship/Title              |  | Classify   | P  |  |  |  |
| C         | 11           | Account (SSN)                   |  | What is your SSN?  | Q  |  |  |  |
| C         | 12           | First Name                      |  | First Name?  | Q  |  |  |  |
| C         | 13           | Last Name                       |  | Last Name?   | Q  |  |  |  |
| C         | 14           | Suffix to Name                  |  | Jr.? Sr.,etc   | Q  |  |  |  |
| C         | 15           | Middle Initial                  |  | Middle Initial?  | Q  |  |  |  |
| C         | 16           | Prefix to Name                  |  | Classify - Mr.,Mrs.,Ms.,Dr.                                    | P  |  |  |  |
| C         | 17           | Preferred Name                  |  | What name do you prefer?                                       | Q  |  |  |  |
| A         | 18           | Birthdate                       | If not Borrower then<br>skip                                 | Birthdate?   | Q  |  |  |  |
| C         | 19           | Street Address                  |  | Street Address?  | Q  |  |  |  |
| C         | 20           | City                            |  | City?  | Q  |  |  |  |
| C         | 21           | State                           |  | State?   | Q  |  |  |  |
| C         | 22           | Zip                             |  | Zip?   | Q  |  |  |  |
| C         | 23           | Country                         |  | Classify   | P  |  |  |  |

| <b>BC</b> | <b>Order</b> | <b>Applet Field Name</b>   | <b>Notes</b> | <b>Question Text</b>   | <b>Question<br/>or<br/>Prompt</b> |  |  |  |
|-----------|--------------|----------------------------|--------------|------------------------|-----------------------------------|--|--|--|
| C         | 24           | Method of Contact          |              | How should we contact  | Q                                 |  |  |  |
| C         | 25           | Home Phone                 |              | Home Phone?            | Q                                 |  |  |  |
| C         | 26           | Work Phone                 |              | Work Phone?            | Q                                 |  |  |  |
| C         | 27           | Mobile Phone               |              | Mobile Phone?          | Q                                 |  |  |  |
| C         | 28           | Fax                        |              | Fax Number?            | Q                                 |  |  |  |
| C         | 29           | Country Code (for phone #) |              | Country Code?          | Q                                 |  |  |  |
| C         | 30           | 1st Email                  |              | Email?                 | Q                                 |  |  |  |
| C         | 31           | 2nd Email                  |              | Another email?         | Q                                 |  |  |  |
| C         | 32           | Hours of Availability      |              | When are you available | Q                                 |  |  |  |
| C         | 33           | Time Zone                  |              | Classify               | P                                 |  |  |  |
| C         | 34           | Special Notes/SME          |              | Enter as needed        | P                                 |  |  |  |
| A         | 35           | Comments                   |              | Enter as needed        | P                                 |  |  |  |
| K         | 36           | Cust Exp Status Notes      |              | Enter as needed        | P                                 |  |  |  |
| A         |              | Account (SSN)              | Duplicate    |                        |                                   |  |  |  |
| A         |              | Last Name                  | Duplicate    |                        |                                   |  |  |  |
| A         |              | Account Type (Customer)    | Duplicate    |                        |                                   |  |  |  |
| A         |              | Street Address             | Duplicate    |                        |                                   |  |  |  |
| A         |              | City                       | Duplicate    |                        |                                   |  |  |  |
| A         |              | State                      | Duplicate    |                        |                                   |  |  |  |
| A         |              | Zip                        | Duplicate    |                        |                                   |  |  |  |
| A         |              | Country                    | Duplicate    |                        |                                   |  |  |  |
| A         |              | Site                       | Duplicate    |                        |                                   |  |  |  |
| A         |              | Phone #                    | Duplicate    |                        |                                   |  |  |  |
| A         |              | Fax #                      | Duplicate    |                        |                                   |  |  |  |
| A         |              | Homepage (email)           | Duplicate    |                        |                                   |  |  |  |
| K         |              | Case #                     | Duplicate    |                        |                                   |  |  |  |
| K         |              | Last Name                  | Duplicate    |                        |                                   |  |  |  |
| K         |              | First Name                 | Duplicate    |                        |                                   |  |  |  |
| K         |              | Account (SSN)              | Duplicate    |                        |                                   |  |  |  |

[illegible]